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ABSTRACT

One of 12 in the secretarial/clerical area, this booklet for vocational instructor contains a job description for educational office personnel, a task list of areas of competency, an occupational tasks competency record (suggested as replacement for the traditional report card), a list of industry representatives and educators involved in developing the project, and statements of competencies and a separate competency record for the area of human relations and personal development. Job duties listed for the educational secretary/clerk include responsibility for various details of school operations, typewritten and telephone communications, recordkeeping, filing, public relations and staff services, equipment and supplies, and mail and reprographic services. Areas of competency in human relations and personal development include communication, self-development, personal appearance, office attitude, social and business etiquette, and job-seeking skills. Statements of competencies may be graded at either the secondary or postsecondary level, and the competency records are intended to follow the student through vocational training at both levels. Tasks in the task list are cross referenced with those in the booklets for other secretarial/clerical jobs. (MF)

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Educational Office Personnel

TASK LIST
COMPETENCY RECORD

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STATEWIDE CURRICULUM ARTICULATION PROJECT
FOR VOCATIONAL EDUCATION
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CROSS REFERENCE SYSTEM

Task Lists in the secretarial/clerical area include: office services aid, typist, general office/typist, receptionist, secretary/non-shorthand, secretary/shorthand, educational office personnel, medical secretary, legal secretary, administrative assistant, correspondence specialist, correspondence supervisor, and data entry operator. All Task Lists contain an add-on list of human relations/personal development qualities desirable for graduates seeking secretarial/clerical positions.

The task lists for office services aid, typist, general office/typist, receptionist, secretary/non-shorthand, and secretary/shorthand are referred to as "GENERAL" secretarial/clerical lists and all additional lists are referred to as "SPECIALIZED" lists.

The * and the numbering system is the key to cross-referencing for the specialized lists. The specialized lists are compared to the lists for typist, general office/typist, receptionist, secretary/non-shorthand, and secretary/shorthand. When there is something on the specialized list that is not on the general lists a * appears. The position of the * indicates the level of change made in the AREA OF COMPETENCY, The Statement of Competency, or the Task. For example, if the * appears before the AREA OF COMPETENCY the entire AREA OF COMPETENCY is new. If the * appears before a Statement of Competency or Task then only that Statement or Task is new. If the * appears before a word then only that word is new or different. It may be necessary to refer to more than one general task list when comparing statements of competency.

The Task List for Data Entry Operator is not referenced to the general lists because the tasks are unique in that area and need specialized training. The Task Lists for Correspondence Specialist and Correspondence Supervisor are not referenced to the general lists because tasks in these areas are applied to a word processing/correspondence center and the procedure for completing the tasks is different from the tasks in the general lists. The Task List for Correspondence Supervisor is cross-referenced as an add-on to the Correspondence Specialist Task List.

INDUSTRY RECOMMENDATIONS

EDUCATIONAL OFFICE PERSONNEL

Industry representatives have made several suggestions to students who will seek employment upon completion of this occupational program. These suggestions are general in nature and describe the kind of individual whom they wish to hire. A competent worker is one who satisfactorially performs the tasks listed in this document and one who is mature and responsible. It is important that an employee have a positive attitude toward work and that he/she continues to learn on the job.

One way an employee continues to learn is through reading articles in professional journals and publications. It is very important for a person employed in an educational office to intelligently communicate with employers, associates, students, parents, and the general public.

The employee who is an asset to the business assumes responsibility for communications (both written and oral) that leave the office. This includes using correct grammar and punctuation, spelling words correctly, and proofreading carefully so that neat and accurate corrections are made. Accuracy and confidentiality are extremely important in educational occupations.

JOB DESCRIPTION

Educational Office Personnel

Other common job titles which graduates may have include: Educational Secretary/Clerk and Secretary to School Management Personnel.

Educational office personnel are responsible for many details of school operations and they perform a variety of tasks ranging from those that are routine in nature to those that are very specialized. He/she must be a well trained office worker while applying secretarial-clerical skills in an educational environment.

He/she must be able to demonstrate a pleasing personality while working with teachers, school staff, students, parents, and the general public.

Graduates of the Educational Office Personnel Program will be qualified to find employment in elementary schools, junior high schools, secondary schools, private and public schools, vocational centers, vocational-technical schools, universities, libraries, and central administrative offices.

TASK LIST

The following Task List gives you, the vocational instructor, recommendations about what your students should be able to do when they take a job as an EDUCATIONAL OFFICE PERSONNEL. It was developed by a working committee of secretarial/clerical instructors and industry representatives throughout the state of Minnesota.

The Task List on the following pages includes the Tasks and the AREAS OF COMPETENCY recommended for a graduate of the Educational Office Personnel Occupational Program.

As you utilize this task list, you will need to continue working with your local advisory committee and with other instructors in your geographic area. Judgments must be made, by you, concerning the amount of time to spend in teaching various tasks, the conditions surrounding the performance of each task and the performance level for each task that will be acceptable.

Educational Office Personnel

TASK LIST

AREA OF COMPETENCY: TYPEWRITTEN COMMUNICATIONS (VERY IMPORTANT)

IV. A. Types *educational correspondence from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription (optional), information compiled and composed at the typewriter, and shorthand note transcription (optional)

1. types business letters in several styles including any of the following features

   a. attention line
   b. carbon notations
   c. *school name in closing
   d. enclosure notations
   e. listed materials
   f. mailing notations
   g. multiple page headings
   h. postscripts
   i. quoted material
   j. reference initials
   k. special closings

---

* The position of the * denotes the scope of the change made in the task, the statement of competency, and the area of competency. This task list is referenced to the task lists for typist, general office/typist, receptionist, secretary/non-shorthand, and secretary/shorthand. If the * immediately precedes a word, then only that word has been changed as compared to the five named task lists. If the * immediately precedes the AREA OF COMPETENCY, a number, or a letter, then the entire area of concern has been changed.

1. special-sized stationery
   (1) executive size
   (2) half size
   (3) legal size
   *(4) metric update
m. statistical date in tabular form
n. subject line

2. types addresses on envelopes

a. addresses for window envelopes
b. mailing address (including ZIP Code)
c. name above printed return address
d. return address
e. special notations

*3. types interschool memoranda

a. plain paper for duplication

*4. types miscellaneous business letters

a. thank you notes
b. referral notes
c. follow-up letters

IV. B. Types multiple copies of general business forms that are pertinent to the specific *organization from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription (optional), information compiled and composed at the typewriter, and shorthand note transcription (optional)

1. types general business forms

a. bills of lading
b. credit memorandums
c. financial reports
d. insurance forms
e. invoices
f. purchase orders
g. purchase requisitions
h. statements of account
i. voucher checks
j. vouchers

IV. C. Types miscellaneous material from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription (optional), information compiled and composed at the typewriter, and shorthand note transcription (optional)

1. types miscellaneous material

a. address, file folder, file drawer labels
b. index cards
c. form letters, form paragraphs, and fill-in information
d. lists (e.g. mailing)
e. summary of minutes of meetings or conferences
f. -omit-
g. postcards
h. meeting agendas
i. daily work schedules
j. manuscripts
k. personnel forms
l. expense reports
m. -omit-
n. itineraries
o. other materials pertinent to the specific business
*p. inventory
*q. news letters and brochures

*r. payroll reports
*s. speeches

I. D. -omit-

I. E. Types or prepares copy for reproduction

1. types and *prepares offset masters
2. types masters for photo reproduction
*3. types and prepares mimeograph stencils
*4. types and prepares fluid duplicator masters

IV. F. Types correspondence, records, reports, forms, and miscellaneous material from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription (optional), information compiled and composed at the typewriter, and shorthand note transcription (optional) with carbon copies

1. types materials with carbon copies

a. to mail
b. *for school file

I. G. Proofreads and makes neat and accurate corrections of typed material

1. makes corrections on

a. copies typed with fabric ribbons
b. copies typed with carbon ribbons
c. carbon copies
d. offset masters
*e. stencil masters
*f. ditto masters

*I. H. Types accurate educational records, educational reports, and educational forms from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription (optional), information compiled and composed at the typewriter, and shorthand note transcription (optional)

1. types records, reports, and forms

   a. locker key lists
   b. honor roll lists
   c. accident report forms
   d. contracts
      (1) teacher
      (2) bus
      (3) other school personnel
   e. schcol handbooks
   f. school lunch menus
   g. student enrollment forms
   h. drop/add sheets
   i. class lists
   j. state high school league reports
   k. programs for athletic events
   l. student transcripts
   m. student permanent record
   n. budgets
   o. school calendar
   p. input sheets for computers
   q. daily announcements
   r. daily or weekly bulletin
   s. schedule of coming events
   t. news releases for local news media
   u. personnel records
   v. salary schedules

w. financial reports
x. federal program budget
y. annual transportation reimbursement reports
z. bus driver qualification reports
aa. research proposals for federal funding
bb. questionnaires for data collection
cc. student financial aids reports
dd. student tuition forms
ee. student work study forms
ff. forms/reports for federal programs
    (1) Title I
    (2) Title II
    (3) Title III
    (4) CETA
    (5) others
gg. census reports
hh. report cards
ii. daily absence reports
jj. pupil accounting reports
kk. teacher class schedules
ll. room schedules

AREA OF COMPETENCY: COMMUNICATIONS COMPOSITION (OPTIONAL)

I. A. Composes business and *educational letters under direct supervision

1. composes business and *educational letters under direct supervision

a. requesting information and/or services
b. expressing appreciation
c. supplying information
d. responding to complaints
e. declining a request
f. acknowledging correspondence

g. expressing acceptance
h. requesting payment
i. giving confirmation
j. expressing condolence
k. extending congratulations

I.B. Composes business and informational reports under direct supervision

I.C. Composes and/or edits other materials under direct supervision

1. gives dictation (such as to a correspondence center)
2. edits letters dictated by others
3. edits manuscripts prepared by others
4. proofreads typewritten/handwritten copy (very important)
5. prepares articles, announcements, news releases, form letters, and cover letters
6. prepares audio and visual materials
7. collects related materials from several reference sources
*8. designs business forms
*9. prepares election ballots

AREA OF COMPETENCY: RECORDS FILING AND MANAGEMENT (VERY IMPORTANT)

II.A. Maintains the currently used filing system

1. codes documents for filing
2. adds new folders
3. locates and retrieves documents

4. refiles documents that have been removed
   a. single pieces in file folders
   b. entire file folder in drawer
5. searches for missing and misplaced materials
6. maintains records of materials taken out of the files
7. follows-up on released materials

I.B. Revises files to keep them current

1. follows employer's directions for retention and disposal
2. follows office procedures for transferring files to inactive files

I.C. Cross-references documents and prepares cross-reference materials

I.D. Maintains index files

I.E. Maintains "tickler" files for follow-up responsibilities

I.F. Maintains "work in progress" file

I.G. -omit-

I.H. -omit-

I.I. Determines recordkeeping needs and suggests a filing system

I.J. Establishes and sets up a filing system

1. requisitions necessary equipment and supplies
2. prepares folders and guides
3. files documents

AREA OF COMPETENCY: PUBLIC RELATIONS AND STAFF SERVICES (VERY IMPORTANT)

II.A. Screens persons who enter the office or building

1. screens visitors in compliance with company/institution security policy
2. makes visitors comfortable
3. gives appropriate information to visitors or answers questions about where needed information can be obtained
4. escorts visitors to appropriate office area
5. makes introductions
6. delivers oral or written messages from visitors to proper persons
7. handles business cards
8. -omit-
9. -omit-

I. B. Manages appointment information

1. schedules appointments
2. records appointment and keeps appointment book current
3. reminds persons of appointments
4. records cancellations and "no shows"
5. maintains guest book

AREA OF COMPETENCY: OFFICE FUNCTIONS

I. A. Keeps the reception area in order

I. B. Operates intercom system

I. C. Maintains a bulletin board of announcements, news, etc.

I. D. Maintains employee information directory

I. E. Writes/prints legibly

*I. F. Arranges and/or conducts tours

*I. G. Administers first aid (Optional)

*AREA OF COMPETENCY: CLERICAL

I. A. Handles attendance procedures (Very important)

1. collects attendance slips
2. makes entries in attendance register
3. checks entries to be sure days absent and days present equal total days
4. issues and collects make-up slips
5. distributes daily absence reports
6. issues student passes

I. B. Handles hot lunch procedures

1. sells tickets
2. collects money
3. punches tickets

4. counts heads
5. orders products
6. accounts for student help

I. C. Assigns student lockers

I. D. Maintains cumulative folders

I. E. Distributes, collects and maintains records of keys

AREA OF COMPETENCY: OFFICE EQUIPMENT (VERY IMPORTANT)

II. A. Maintains office equipment

1. changes equipment ribbons
2. cleans office equipment
3. recommends service on equipment
4. handles service calls on equipment
5. handles routine maintenance of equipment
6. makes minor repairs on office equipment

II. B. Selects and keeps equipment current

1. prepares requisitions for equipment
2. maintains records of equipment inventory
3. determines requirements for equipment

AREA OF COMPETENCY: *SCHOOL SUPPLIES/OFFICE SUPPLIES (IMPORTANT)

III.A. Maintains and keeps up to date personal, office inventory of supplies, *and school inventory

1. determines requirements for personal supplies, office supplies, *and school supplies
2. prepares requisitions or requests
3. maintains and checks inventory records to determine if minimum quantities of supplies are on hand
4. orders and obtains supplies as needed from suppliers
5. checks incoming supplies with packing slip or invoice
6. unpacks and stores incoming supplies
7. maintains suppliers contact file
8. distributes and controls office supplies and *school supplies
9. prepares purchase orders
10. -omit-

AREA OF COMPETENCY: MEETING/TRAVEL ARRANGEMENTS (VERY IMPORTANT)

I.A. Makes travel arrangements (Important)

1. plans a schedule using

   a. travel agency
   b. printed schedules from transportation companies
   c. -omit-

2. composes, types, and mails letters of reservation
3. purchases and/or prepares tickets
4. prepares materials for employer's briefcase

5. prepares itinerary
6. makes and confirms transportation reservations
7. makes and confirms hotel and motel reservations
8. obtains necessary travel funds
9. compiles and types expense reports
10. maintains telephone and mail digest for absent employer
*11. arranges transportation for field trips

I. B. Schedules meetings and/or conferences (Important)

1. contacts speakers
2. mails or distributes notices and specifics regarding location of meetings
3. schedules meeting times
4. sends confirmation notes as reminders of meetings
5. makes and notifies participants of changes or cancellations of meetings
6. reserves meeting room and arranges for refreshments
7. prepares and inspects meeting room for arrangements and equipment
8. processes registration for conference participants
9. assembles needed materials for use during meetings
10. prepares agenda for meetings
11. attends meeting and reads minutes
12. attends meeting and takes minutes
13. distributes the typed minutes in person or by mail
*14. submits copy of minutes to local newspapers

AREA OF COMPETENCY: TELEPHONE COMMUNICATIONS (VERY IMPORTANT)

I. A. Answers incoming telephone calls

1. uses single line

2. uses multiple line
3. transfers calls to correct department or person
4. screens incoming calls
5. answers inquiries posed by telephone callers
6. records telephone messages (date and time)
7. requests complete information to make return calls
8. delivers telephone messages promptly
*9. uses switchboard

I. B. Places outgoing telephone calls

1. places local calls
2. places long distance calls

   a. direct distance dial (ddd)
   b. person-to-person
   c. station-to-station
   d. collect
   e. credit card

3. places calls using specialized telephone services

   a. conference calls
   b. overseas long-distance calls
   c. -omit-
   d. specialized long-distance networks, such as WATS

I. C. Places outgoing and receives incoming calls using specialized telephone equipment (Optional)

1. operates speakerphone
2. operates picture phone (optional)

3. uses bell-boy service (pager service)
4. uses card dialers
5. -omit-
6. -omit-

I. D. Finds needed information by using the telephone directory

1. uses the white pages
2. uses the yellow pages

I. E. Maintains internal telephone records and checks them against billing

1. keeps list of frequently called numbers current
2. records long distance calls made
3. reminds employer to return calls
4. checks bill from telephone company with record of long distance calls made
*5. submits monthly reports

I. F. -omit-

*I. G. Calls parents of absentees to ascertain reasons for absence

AREA OF COMPETENCY: MAIL (IMPORTANT)

II. A. Receives and processes incoming mail

1. collects mail from post office or mailing department (optional)
2. sorts unopened incoming mail for delivery to departments or individuals

a. -omit-
b. -omit-

3. mends torn or damaged mail
4. prepares and attaches a routing slip
5. delivers incoming mail to proper persons or departments
6. makes notation in mail register
7. signs for packages received from shippers or UPS
8. pays for packages received COD
9. determines disposition of inadequately addressed mail
10. opens incoming business mail, sorts contents, checks enclosures, time/date stamps
11. attaches pertinent information to incoming mail
12. makes filing notations and/or calendar notations
*13. unpacks and checks in teachers orders to make sure they agree with invoices

I. B. Prepares outgoing mail

1. collects mail from other offices or departments (optional)
2. folds and stuffs envelopes for mailing
3. addresses envelopes for mass mailings
4. decides on least expensive and/or most desirable method of communication or delivery
5. processes outgoing letters and packages requiring special handling and/or special rates
6. processes bulk mailings
7. prepares and sends telegrams, cablegrams, or mailgrams
8. prepares, updates, and checks mailing lists
9. operates a postage meter
10. records use of postage meter in "Meter Record Book"
11. takes postage meter to post office to be refilled (optional)
12. operates a postage scale to determine correct postage
13. attaches correct postage
14. wraps packages for mailing
15. writes zip codes on incoming or outgoing mail
16. files return receipts from registered or certified mail
17. insures mail
18. registers mail

AREA OF COMPETENCY: REPROGRAPHIC SERVICES (VERY IMPORTANT)

II. A. Supervises and/or creates needed copies

1. operates duplicating equipment

   a. offset
   b. copier
   *c. mimeograph
   *d. fluid duplicator

2. collates materials

   a. manually
   b. by machine

3. binds materials

   a. manually
   b. by machine

4. folds pages

   a. manually
   b. by machine

5. proofreads to insure accuracy

I. B. Makes decisions about reprographic needs

1. decides what materials need to be copied
2. decides on the least expensive and/or most desirable method to duplicate materials
3. makes arrangements to have materials duplicated

AREA OF COMPETENCY: NUMERICAL DATA (OPTIONAL—LARGE DISTRICTS, IMPORTANT—SMALL DISTRICTS)

*I. A. Maintains cash funds

1. obtains checks to establish or replenish cash funds
2. makes payments from cash funds
3. prepares vouchers for money taken out or received
4. records cash entries in a journal or check register
5. prepares cash reports
6. reconciles cash funds

I. B. -omit-

I. C. Prepares payroll

*1. distributes W-4 Forms, PERA, TERA, and membership application forms to new employees
2. maintains personnel records
3. prepares time cards for employees
4. computes payroll

   a. time worked
      *(1) basis of experience/credits
      *(2) number of years
      *(3) extra duty
      *(4) overtime

5. computes city, state, or federal taxes using printed tax tables
6. records time, earnings, etc., on employee's earnings record
7. prepares payroll checks
8. distributes payroll checks

9. compiles payroll information to prepare employer's quarterly and annual tax forms
10. prepares and mails payroll tax reports
11. prepares and mails/distributes end of year reports (W-2 Forms)
12. keeps records of vacation time
13. keeps personnel records of sick leave
*14. computes taxshelter annuities, dues, teacher retirement, P.E.R.A. staff retirement, health insurance, and other deductions
*15. prepares quarterly teacher retirement report
*16. prepares quarterly social security for

    a. P.E.R.A. members (Public Employees Retirement)
    b. teacher retirement members

*17. prepares monthly P.E.R.A. and T.E.R.A. reports

I. D. Maintains checking account

1. prepares receipts for incoming cash
2. endorses incoming checks for deposit
3. prepares bank deposits from incoming cash
4. enters amount of deposit in checkbook
5. enters deposits in journals or check register
6. takes deposits to bank according to accepted procedure
7. prepares checks
8. uses checkprotector
9. enters checks written in journal or check register
10. reconciles bank statements
11. files cancelled checks
12. signs a check signature card to sign checks
13. signs checks (optional)
14. purchases special checks from the bank

    a. certified
    b. bank drafts
    c. money orders

I. E. Handles payment of bills and statements

1. checks accuracy of source documents
2. verifies items and checks accuracy and figures on statements
3. calculates discounts
4. -omit-
5. records on the invoices or statements the date paid, check number, initials
6. attaches stubs of bills to checks and presents for signature
7. files invoices/statements marked paid
*8. codes forms, bills, statements, etc.
*9. determines which invoices are due
*10. prepares claim sheets
*11. attaches vouchers to bills

    a. code number
    b. amount of each code
    c. total of invoice

I. F. Maintains accounts receivable records

1. calculates accounts receivable from source documents to keep customer ledger cards current
2. prepares billing for accounts receivable

    a. makes a copy of the bill
    b. mails the bill

3. -omit-
*4. files bills after payment

I. G. Maintains accounts payable records

1. calculates accounts payable from source documents to keep accounts payable records current
2. records payments

I. H. Maintains journals

1. prepares purchase orders, invoices, vouchers, receipts or other source documents to record in journals
2. records data in journals for financial statements
3. prepares periodic trial balance of the books

I. I. -omit-

I. J. -omit-

*I. K. Prepares financial reports

1. monthly reports for school board
2. reports for State Department

*I. L. Keeps records of credits and/or collections

1. student tuition
2. lab fees
3. key deposits
4. book fees

*I. M. Keeps necessary investments and insurance records for the school or office (under supervision)

1. processes securities (stocks & bonds), real estate, and insurance premiums
2. computes interest
3. calculates and records all income received

4. makes premium payments
5. keeps records for tax purposes

    a. sales tax
    b. real estate tax

6. keeps files current

*I. N. Keeps necessary records for reports and report preparation

1. keeps records for

    a. mileage reports
    b. maintenance reports
    c. contracted services where Federal and State reporting is required for payment

*I. O. Prepares necessary State and Federal funding forms

*I. P. Maintains activity fund ledger

*I. Q. Maintains school district's books

1. keeps clerk's records up to date
2. keeps treasurer's records up to date

*I. R. Compiles results of surveys

1. compiles survey results for

    a. census
    b. new program proposals

c. student follow-up
d. industrial labor survey
e. student employment opportunities
f. federal or state requests

*I. S. Prepares miscellaneous reports

1. calculates equipment depreciation
2. prepares workmen's compensation reports
3. prepares unemployment compensation reports

AREA OF COMPETENCY: DATA PROCESSING (VERY IMPORTANT)

I. A. Fills out forms for input data for computer

I. B. Makes corrections on input sheets for computer

I. C. Prepares input from source documents

I. D. Uses computer printouts to obtain required information to prepare proper forms

I. E. Checks source documents against computer printouts for accuracy

AREA OF COMPETENCY: REFERENCE MATERIALS (IMPORTANT)

III.A. Uses general reference materials to look up spelling, pronunciation, definition of terms, compose, edit and aid in research

1. uses general reference materials

   a. office or *school's procedures manual
   b. dictionary
   c. telephone directory and yellow pages
   d. quick reference words manual
   e. thesaurus
   f. outside agencies (both internal and external to the profession)
   g. city directory
   h. postal manual
   i. ZIP Code directory
   j. secretary's reference manual
   k. company files
   l. past records
   m. word division manual
   n. equipment operator manual
   o. library
   *p. hotel and travel guides
   *q. maps

I. B. Maintains *supervisor's reference library

*I. C. Uses reference materials specifically for the school office employee to look up spelling, pronunciation, definition of terms, compose, edit and aid in research

1. uses specific reference materials

a. supply catalog for instructors
b. manual for Uniform Financial Accounting for Minnesota School Districts
c. school procedures manual
d. school office procedures manual
e. school secretary's handbook
f. school districts master labor contract
g. File It Right-Find It Right

*AREA OF COMPETENCY: WORD PROCESSING/CORRESPONDENCE SKILLS (OPTIONAL)

I. A. Performs logging-in procedures for work received in recorded form

1. removes media from recorder
2. places clean media on recorder when necessary
3. completes log sheet and attaches media removed from recorder
   a. records time dictation was received
4. places media and log sheet in hold folder according to "work in progress" procedures

I. B. Performs logging-in procedures for hard copy

1. completes log sheet and attaches to hard copy
   a. records time copy was received
2. places hard copy and log sheet in hold folder according to "work in progress" procedures

I. C. Performs logging-in procedures for stored copy

1. selects needed materials from stored copy file
2. completes log sheet indicating amount of work and time of completion

I. D. Files, locates, and retrieves or plays back stored documents (magnetic media and typewritten copy) in procedure with the currently used filing system

I. E. Codes documents for filing by assigning code numbers and author's name or number according to the system used

I. F. Retains completed magnetic output media for a predetermined number of days

I. G. Keyboards on magnetic keyboard from recorded media, hard copy, or stored documents and produces final copy as requested

1. removes recorded media, hard copy, or stored documents from central hold folder or stored document file following the procedures used to obtain materials needed for keyboarding

   a. indicates time and date picked up on log sheet

2. keyboards materials obtained

   a. types copy

      (1) rough-draft form
      (2) first-time-final
      (3) documents for permanent storage

3. edits and proofreads for playback in final form

   a. punctuation
   b. spelling
   c. grammar
   d. word division
   e. format

4. plays back in final form rough draft, materials that have been edited for delivery of final copy

5. uses line counter or specific office measuring procedure to determine amount of work typed

6. completes log sheet to indicate work completed

   a. indicates time completed
   b. classifies type of document

      (1) original
      (2) hard copy
      (3) stored document
      (4) revisions
      (5) statistical

   c. determines amount of work completed

      (1) lines
      (2) pages
      (3) keystrokes
      (4) time

7. scans, erases, refiles, or returns to user the transcribed media, hard copy, or stored documents as determined by center procedures

8. routes completed copy to word originator

I. H. Keyboards on magnetic keyboard variable information when playing back stored documents

1. obtains stored document according to center procedures
2. plays back stored material and inserts variable information as needed
3. edits and proofreads for accurate final copy
4. measures work
5. completes log sheet
6. completes copy and returns to word originator for final approval

I. I. Proofreads all typed material for accuracy

I. J. Uses specialized reference materials for understanding of operations, procedures, and utilization of a word processing system

1. uses author's manual or book of authorized users of the system
2. uses secretary and dictator procedure manuals

AREA OF COMPETENCY: MACHINE OPERATION

I. A. Operates the standard manual typewriter to perform basic office duties

I. B. Operates the standard electric typewriter to perform basic office duties

I. C. Operates the standard selectric typewriter to perform basic office duties

I. D. Operates the self-correcting typewriter to perform basic office duties (Optional)

I. E. Operates the proportional spacing typewriter to perform basic office duties (Optional)

I. F. Operates the automatic/power typewriter to perform basic office duties (Optional)
Kind:_____

I. G. Operates the 10-key adding machine to perform basic office duties

I. H. Operates the electronic display calculator to perform basic office duties

I. I. Operates the electronic printing calculator to perform basic office duties

I. J. Operates the printing calculator to perform basic office duties (Optional)

I. K. -omit-

I. L. Operates the transcribing machine to perform basic office duties

AREA OF COMPETENCY: SUPERVISED WORK EXPERIENCE, OFFICE SIMULATION, STUDENT ORGANIZATIONS (OPTIONAL)

I.A. Participates in supervised work experience training (co-op, internship)

I.B. Participates in a simulated office program

I.C. Participates in co-curricular student organizations

COMPETENCY RECORD

The COMPETENCY RECORD that appears in this section is suggested as a replacement for the traditional report card. It can be used to give employers, teachers, counselors, students and parents information about what each student can and cannot do.

The COMPETENCY RECORD should follow the student through his or her vocational training in the secondary and/or the post-secondary school. The recommended grading scale is shown on the COMPETENCY RECORD. The COMPETENCY RECORD on the following pages includes ALL the AREAS OF COMPETENCY recommended for a graduate of the Educational Office Personnel Occupational Program.

COMPETENCY RECORD

OCCUPATIONAL PROGRAM: **Educational Office Personnel** Name of Student _____

This competency record tells what the student, who is named above, has demonstrated that he or she can do. A graduate is one who has demonstrated competent performance of all the tasks designated for this occupational program. This competency record is to be used as an expansion of and/or supplement to the traditional report card. Student performance can be rated at the secondary and/or post secondary level.

RATING SCALE:

5 - Performs task(s) with ability that consistently exceed(s) program minimum standards set for job entry level; very competent.

4 - Performs task(s) at job entry level; competent.

3 - Performs task(s) with periodic assistance.

2 - Performs task(s) with constant assistance.

1 - Is unable to perform task(s).

T - Demonstrated ability to perform task(s) at or above job entry level by taking a challenge test.

PWPM - Actual production words per minute (PWPM) obtained by student.

SCHOOL(S) ATTENDED: DATES ATTENDED INSTRUCTOR'S NAME(S)

_____

_____

_____

_____

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: TYPEWRITTEN COMMUNICATIONS (VERY IMPORTANT)							
IV.A. Types *educational correspondence from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription (optional), information compiled and composed at the typewriter, shorthand note transcription (optional)	*						
IV.B. Types multiple copies of general business forms that are pertinent to the specific *organization from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription (optional) information compiled and composed at the typewriter, shorthand note transcription (optional)	*						
IV.C. Types miscellaneous material from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription (optional), information compiled and composed at the typewriter, and shorthand note transcription (optional)	*						
I.D. -omit-							
I.E. Types or prepares copy for reproduction	*						
IV.F. Types correspondence, records, reports, forms, and miscellaneous material from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription (optional), information compiled and composed at the typewriter, and shorthand note transcription (optional) with carbon copies	*						

	MINIMUM PROGRAM STANDARD	SECONDARY RATING	SECONDARY YR.	SECONDARY INSTR.	POST SECONDARY RATING	POST SECONDARY YR.	POST SECONDARY INSTR.
I.G. Proofreads and makes neat and accurate corrections of typed material							
*I.H. Types accurate educational records, educational reports, and educational forms from: typed rough draft, handwritten rough draft, verbal instruction, verbal dictation at the typewriter, machine transcription (optional), information compiled and composed at the typewriter, and shorthand note transcription (optional)	*						
Comments: *Rough draft _____pwpm (___pwpm minimum standard) for ___ minutes (___ minutes): Machine transcription ___ pwpm (___pwpm minimum standard) for ___ minutes (___ minutes): Shorthand (Kind:_____) taken at ___wpm (___wpm minimum standard) for ___ minutes (___minimum minutes) with ___% accuracy (___% minimum accuracy): Shorthand (Kind:_____) note transcription at ___pwpm (___pwpm minimum standard)							
AREA OF COMPETENCY: COMMUNICATIONS COMPOSITION (OPTIONAL)							
I.A. Composes business and *educational letters under direct supervision							
I.B. Composes business and informational reports under direct supervision							
I.C. Composes and/or edits other materials under direct supervision							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: RECORDS FILING AN MANAGEMENT (VERY IMPORTANT)							
II.A. Maintains the currently used filing system							
I.B. Revises files to keep them current							
I.C. Cross-references documents and prepares cross-reference materials							
I.D. Maintains index files							
I.E. Maintains "tickler" files for follow-up responsibilities							
*I.F. Maintains "work in progress" file							
I.G. -omit-							
I.H. -omit-							
I.I. Determines recordkeeping needs and suggests a filing system							
I.J. Establishes and sets up a filing system							
Comments:							
AREA OF COMPETENCY: PUBLIC RELATIONS AND STAFF SERVICES (VERY IMPORTANT)							
II.A. Screens persons who enter the office or *building							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Manages appointment information							
Comments:							
AREA OF COMPETENCY: OFFICE FUNCTIONS							
I.A. Keeps the reception area in order							
I.B. Operates intercom system							
I.C. Maintains a bulletin board of announcements, news, etc.							
I.D. Maintains employee information directory							
I.E. Writes/prints legibly							
*I.F. Arranges and/or conducts tours							
*I.G. Administers first aid (Optional)							
Comments:							
*AREA OF COMPETENCY: CLERICAL							
I.A. Handles attendance procedures (Very important)							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Handles hot lunch procedures							
I.C. Assigns student lockers							
I.D. Maintains cumulative folders							
I.E. Distributes, collects and maintains records of keys							
Comments:							
AREA OF COMPETENCY: OFFICE EQUIPMENT (VERY IMPORTANT)							
II.A. Maintains office equipment							
II.B. Selects and keeps equipment current							
Comments:							
AREA OF COMPETENCY: *SCHOOL SUPPLIES/OFFICE SUPPLIES (IMPORTANT)							
III.A. Maintains and keeps up to date personal, office inventory of supplies, and *school inventory							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
Comments:							
AREA OF COMPETENCY: MEETING/TRAVEL ARRANGEMENTS							
I.A. Makes travel arrangements (Important)							
I.B. Schedules meetings and/or conferences (Important)							
Comments:							
AREA OF COMPETENCY: TELEPHONE COMMUNICATIONS (VERY IMPORTANT)							
I.A. Answers incoming telephone calls							
I.B. Places outgoing telephone calls							
I.C. Places outgoing and receives incoming calls using specialized telephone equipment (Optional)							
I.D. Finds needed information by using the telephone directory							
II.E. Maintains internal telephone records and checks them against billing							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.F. -omit-							
*I.G. Calls parents of absentees to ascertain reasons for absence							
Comments:							
AREA OF COMPETENCY: MAIL (IMPORTANT)							
II.A. Receives and processes incoming mail							
I.B. Prepares outgoing mail							
Comments:							
AREA OF COMPETENCY: REPROGRAPHIC SERVICES (VERY IMPORTANT)							
II.A. Supervises and/or creates needed copies							
I.B. Makes decisions about reprographic needs							
Comments:							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: NUMERICAL DATA (OPTIONAL-LARGE DISTRICTS, IMPORTANT-SMALL DISTRICTS)							
*I.A. Maintains cash funds							
I.B. -omit-							
I.C. Prepares payroll							
I.D. Maintains checking account							
I.E. Handles payment of bills and statements							
I.F. Maintains accounts receivable records							
I.G. Maintains accounts payable records							
I.H. Maintains journals							
I.I. -omit-							
I.J. -omit-							
*I.K. Prepares financial reports							
*I.L. Keeps records of credits and/or collections							
*I.M. Keeps necessary investments and insurance records for the school or office (under supervision)							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
*I.N. Keeps necessary records for reports and report preparation							
*I.O. Prepares necessary State and Federal funding forms							
*I.P. Maintains activity fund ledger							
*I.Q. Maintains school district's books							
*I.R. Compiles results of surveys							
*I.S. Prepares miscellaneous reports							
Comments							
*AREA OF COMPETENCY: DATA PROCESSING (VERY IMPORTANT)							
I.A. Fills out forms for input data for computer							
I.B. Makes corrections on input sheets for computer							
I.C. Prepares input from source documents							
I.D. Uses computer printouts to obtain required information to prepare proper forms							
I.E. Checks source documents against computer printouts for accuracy							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
Comments:							
AREA OF COMPETENCY: REFERENCE MATERIALS (IMPORTANT)							
III.A. Uses general reference to look up spelling, pronunciation, definition of terms, compose, edit and aid in research							
I.B. Maintains *supervisor's reference library							
*I.C. Uses reference materials specifically for the school office employee to look up spelling, pronunciation, definition of terms, compose, edit and aid in research							
Comments:							
*AREA OF COMPETENCY: WORD PROCESSING/CORRESPONDENCE SKILLS (OPTIONAL)							
I.A. Performs logging-in procedures for work received in recorded form							
I.B. Performs logging-in procedures for hard copy							
I.C. Performs logging-in procedures for stored copy							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.D. Files, locates, and retrieves or plays back stored documents (magnetic media and typewritten copy) in procedure with the currently used filing system							
I.E. Codes documents for filing by assigning code numbers and author's name or number according to the system used							
I.F. Retains completed magnetic output media for a predetermined number of days							
I.G. Keyboards on magnetic keyboard from recorded media, hard copy, or stored documents and produces final copy as requested							
I.H. Keyboards on magnetic keyboard variable information when playing back stored documents							
I.I. Proofreads all typed material for accuracy							
I.J. Uses specialized reference materials for understanding of operations, procedures, and utilization of a word processing system							
Comments:							
AREA OF COMPETENCY: MACHINE OPERATION							
I.A. Operates the standard manual typewriter to perform basic office duties							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
I.B. Operates the standard electric typewriter to perform basic office duties							
I.C. Operates the selectric typewriter to perform basic office duties							
I.D. Operates the self-correcting typewriter to perform basic office duties (Optional)							
I.E. Operates the proportional spacing typewriter to perform basic office duties (Optional)							
I.F. Operates the automatic/power typewriter to perform basic office duties (Optional) Kind:_____							
I.G. Operates the 10-key adding machine to perform basic office duties							
I.H. Operates the electronic display calculator to perform basic office duties							
I.I. Operates the electronic printing calculator to perform basic office duties							
I.J. Operates the printing calculator to perform basic office duties (Optional)							
I.K. -omit-							
I.L. Operates the transcribing machine to perform basic office duties							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
Comments:							
AREA OF COMPETENCY: SUPERVISED WORK EXPERIENCE, OFFICE SIMULATION, STUDENT ORGANIZATIONS (OPTIONAL)							
I.A. Participates in supervised work experience training (co-op or internship) Type of business, institution, or agency: _____ _____ Length of time: _____							
I.B. Participates in a simulated office program Length of program: _____							
I.C. Participates in co-curricular student organizations Name of organizations: _____ _____							
Comments:							

Statements of competencies can be graded at either the secondary or post-secondary level.

INDUSTRY REPRESENTATIVES

THE FOLLOWING INDUSTRY REPRESENTATIVES WERE INVOLVED
IN THE DEVELOPMENT OF THE TASK LIST FOR THIS OCCUPATIONAL PROGRAM

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HUMAN RELATIONS AND PERSONAL DEVELOPMENT

Secretarial/clerical personnel work with people. For this reason additional competencies in the area of Human Relations and Personal Development are needed by the student who wishes to become employed. People work together when they have an understanding of themselves and their co-workers and when they willingly make appropriate adjustments in their own behavior.

The STATEMENTS OF COMPETENCY shown in the following section of this task list represent the minimal Human Relationship and Personal Development skills needed by graduates of secretarial/ clerical programs. It should be recognized that students will continue to learn about themselves and others through daily experiences they have in their careers.

HUMAN RELATIONS AND PERSONAL DEVELOPMENT

AREA OF COMPETENCY: COMMUNICATIONS

A. Demonstrates acceptance of people in a friendly business-like manner

1. interacts verbally with people in communicating a message

   a. enunciates clearly
   b. uses correct grammar and appropriate choice of words
   c. shows/demonstrates tact
   d. responds courteously
   e. uses a pleasant speaking tone, rate and volume

2. asks, remembers and uses persons' names in communicating with people

3. interacts non-verbally with people in communicating a message

   a. recognizes the meaning of facial expression
   b. recognizes the meaning of body language
   c. recognizes the meaning of eye contact
   d. recognizes the meaning of hidden messages

B. Listens to and responds to the messages received from co-workers, supervisors and visitors

1. takes notes when receiving instructions
2. periodically looks at the person who is speaking to obtain visual cues
3. asks for clarification when the message is not understood
4. concentrates on one thing at a time as directions are given

C. Gives directions and responds to other people

1. makes use of an understanding of human behavior
2. displays an ability to be assertive without being offensive
3. deals effectively with angry or defensive co-workers/customers
4. recognizes the uniqueness of and differences in individuals

AREA OF COMPETENCY: SELF-DEVELOPMENT

A. Demonstrates a disposition for continued personal growth and understanding of self

1. thinks positively about himself/herself and his/her future
2. does not show off to bolster his/her self-confidence
3. waits for what he/she wants
4. makes up his/her mind decisively
5. admits his/her shortcomings
6. recognizes and builds on his/her strengths without becoming vain
7. seeks out new ways to develop his/her talents
8. has a realistice self-image based upon the way that others see him/her
9. has a positive attitude about self and others

B. Displays personal development for social living

1. handles personal finances
2. chooses life style and housing options
   a. displays an ability to live and work with others harmoniously
3. chooses safe and reliable transportation
4. identifies personal biases, prejudices, and stereotypes

C. Shows emotional maturity

1. tolerates frustrations
2. thinks for himself/herself
3. is calm and exerts extra effort to keep on an even level
4. tackles unpleasant tasks without self-pity
5. takes responsibility for his/her own actions
6. understands his/her role in group dynamics
7. takes orders without becoming obstinate
8. is motivated by a long-range plan, not by whims or desires of each passing week
9. does not nurse grudges or try to get even

D. Maintains professional maturity

1. has clearly defined career goals

   a. views his/her job professionally, rather than as only a means of obtaining a pay check
   b. sees job satisfaction as part of good mental health
   c. sets realistic goals based on his/her abilities

AREA OF COMPETENCY: PERSONAL APPEARANCE

A. Maintains good physical fitness behavior patterns

1. gets sufficient sleep
2. shows good nutrition

3. gets proper exercise
4. has annual dental and medical check-ups
5. has good posture

B. Shows good visual poise

1. demonstrates an appropriate method of standing, walking, sitting, bending and lifting

C. Selects and wears proper office attire

1. is groomed attractively and tastefully
   a. wears clean, wrinkle free garments
   b. wears flattering colors and garment styles for his/her figure
   c. chooses accessories that are appropriate for work
      (1) fads
      (2) fashions
   d. coordinates colors of garments and accessories worn together
   e. plans a wardrobe for a limited budget
   f. wears shoes that are quiet, polished, fastened and in good repair
   g. shops for clothing that is well constructed so that it will last

D. Has good personal hygiene habits

1. bathes his/her body regularly
2. uses antiperspirant
3. has clean hair, skin, teeth, nails, and breath
4. wears clean clothes that have been laundered properly
5. removes hair properly and regularly from selected areas of the body
6. applies cosmetics in a skillful way to enhance features
7. subtly applies body fragrances

AREA OF COMPETENCY: OFFICE ATTITUDE

A. Relates to male and female co-workers of all ages, skills, backgrounds, and positions

1. contributes to a team effort

   a. requests and/or gives assistance to other people
   b. handles constructive/non-constructive criticism and profits from it
   c. declines invitations gracefully
   d. responds cheerfully and gives praise when appropriate
   e. is supportive and encouraging to co-workers

2. assumes individual job responsibility
3. deals effectively with friction and tension within the office

   a. co-workers who don't assume full share of workload
   b. moodiness of co-workers/supervisors
   c. favoritism among staff
   d. personal problems which interfere with work
   e. offensive language or behavior of co-workers, supervisor or customers
   f. improper hygiene of co-workers which is offensive to others
   g. angry customers
   h. chronic complainers
   i. short-tempered co-workers, supervisor or self

B. Supports company and employer by exhibiting professionalism

1. shows loyalty to company
2. follows the company's policies
3. maintains confidentiality of company/institutional information
4. anticipates needs of supervisor
5. demonstrates cost control

   a. conserve supplies
   b. use time efficiently
   c. develop and improve personal work methods and procedures

6. displays good housekeeping habits

   a. cleans and maintains work area
   b. cleans and organizes employer's work area as instructed
   c. makes coffee and keeps coffee area neat and clean

7. shows professional commitment to his/her employer

   a. shows flexibility and willingness to try new approaches
   b. is versatile and willing to adopt his/her behavior to new situations
   c. willingly works overtime to meet scheduled deadlines
   d. asserts his/her feeling, needs, and competence in communicating with his/her employer about salary, benefits, and company policy

C. Shows that he/she is dependable in the office situation

1. has work habits that insure work being accomplished on time and correctly
2. arrives at work on time and maintains scheduled working hours
3. plans and schedules work assignments and priorities
4. takes reasonable coffee breaks and lunch breaks
5. has a good attendance record with sick leave and personal days taken when necessary
6. pays attention to detail so that high quality work is maintained consistently
7. follows through to completion work that has been started

D. Shows initiative in gaining professional advancements

1. seeks job/self enhancement experiences

a. updates his/her skills and knowledge through formal education, in-house training, and informal communication
b. participates in professional organizations

2. selects or rejects job promotions based on opportunity, personal goals, and circumstances

a. examines alternatives and engages in career planning

(1) long term
(2) short term

AREA OF COMPETENCY: SOCIAL AND BUSINESS ETIQUETTE

A. Displays proper social etiquette

1. etiquette for social functions (e.g. introductions, table manners, common courtesy)

B. Displays proper business etiquette

1. converses with co-workers and guests in a socially acceptable manner, within the time constraint of the office situation

a. office business (non-confidential)
b. personal business
c. social events
d. topics of general interest

2. uses the informal communications network (grapevine) within the office in a positive way

3. refrains from contibuting to office gossip

4. addresses superior properly (e.g. Mr., Dr., Ms., etc.)

   a. formal
   b. non-formal

AREA OF COMPETENCY: JOB SEEKING SKILLS

A. Identifies job opportunities for which he/she is qualified

   1. checks school bulletin board
   2. reads newspaper ads
   3. contacts employment agencies

      a. state
      b. private

   4. uses personal contacts

B. Prepares for job interview

   1. writes and types a resume
   2. composes and types a letter of application
   3. contacts a prospective employer
   4. arrives on time
   5. conveys an optimistic outlook and willingness to learn

C. Participates in a job interview

   1. dresses and grooms himself/herself appropriately
   2. obtains job information from perspective employer

      a. job requirements
      b. benefits
      c. environment
      d. salary
      e. opportunity for advancement
      f. company's purpose and function

D. Follows-up on the job interview

   1. sends an acknowledgment letter
   2. makes a phone call

COMPETENCY RECORD

HUMAN RELATIONS AND PERSONAL DEVELOPMENT

OCCUPATIONAL PROGRAM: EDUCATIONAL OFFICE PERSONNEL Name of Student _____

This competency record tells what the student, who is named above, has demonstrated that he or she can do. A graduate is one who has demonstrated competent performance of all the tasks designated for this occupational program. This competency record is to be used as an expansion of and/or supplement to the traditional report card. Student performance can be rated at the secondary and/or post secondary level.

RATING SCALE:

5 - Performs task(s) with ability that consistently exceed(s) program minimum standards set for job entry level; very competent.

4 - Performs task(s) at job entry level; competent.

3 - Performs task(s) with periodic assistance.

2 - Performs task(s) with constant assistance.

1 - Is unable to perform task(s).

T - Demonstrated ability to perform task(s) at or above job entry level by taking a challenge test.

PWPM - Actual production words per minute (PWPM) obtained by student.

SCHOOL(S) ATTENDED: DATES ATTENDED INSTRUCTOR'S NAME(S)

_____

_____

_____

_____

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
AREA OF COMPETENCY: COMMUNICATIONS							
A. Demonstrates acceptance of people in a friendly-business-like manner							
B. Listens to and responds to the messages received from co-workers, supervisors and visitors							
C. Gives directions and responds to other people							
Comments:							
AREA OF COMPETENCY: SELF-DEVELOPMENT							
A. Demonstrates a disposition for continued personal growth and understanding of self							
B. Displays personal development for social living							
C. Shows emotional maturity							
D. Maintains professional maturity							
Comments:							

AREA OF COMPETENCY: PERSONAL APPEARANCE							
A. Maintains good physical fitness behavior patterns							
B. Shows good visual poise							
C. Selects and wears proper office attire							
D. Has good personal hygiene habits							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
Comments:							
AREA OF COMPETENCY: OFFICE ATTITUDE							
A. Relates to male and female co-workers of all ages, skills, backgrounds, and positions							
B. Supports company and employer by exhibiting professionalism							
C. Shows that he/she is dependable in the office situation							
D. Shows initiative in gaining professional advancements							
Comments:							
AREA OF COMPETENCY: SOCIAL AND BUSINESS ETIQUETTE							
A. Displays proper social etiquette							
B. Displays proper business etiquette							
Comments:							
AREA OF COMPETENCY: JOB SEEKING SKILLS							
A. Identifies job opportunities for which he/she is qualified							
B. Prepares for job interview							
C. Participates in a job interview							

	MINIMUM PROGRAM STANDARD	SECONDARY			POST SECONDARY		
		RATING	YR.	INSTR.	RATING	YR.	INSTR.
D. Follows up on the job interview							
Comments:							

Statements of competencies can be graded at either the secondary or post-secondary level.

CE 009 583

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